**MR2300 Unit 5 (Chapter 7) Primary Data Research - Surveys**

**Learning Objectives::**

By the end of this unit, you should be able to:

* Discuss the nature of surveys in Market research.
* Understand the advantages and disadvantages of surveys
* Describe the various types of surveys
* Describe the various types of survey error
* Discuss possible strategies to reduce survey error

**Learning Materials:**

Read: Chapter 7 Essentials of Marketing Research, 2nd or 3rd edition William G. Zikmund, Thompson.

**Overview of This Unit:**

In this unit and the next two units we will begin looking at the core challenge in Marketing Research Primary data collection. Unlike secondary data or historical data which is previously collected and assembled for some project other than the one at hand, primary data is gathered specifically for the project at hand. This unit will review the overall research process and then begin to discuss the first of three major methods of Primary data collection: Surveys, Observation and Experiments.

In this unit we will discuss Survey Research. Survey research is a very useful and commonly used tool in collecting primary information. Surveys require asking people (respondents) for information using either written or verbal questioning. Questionnaires or interviews collect data through the mail, on the telephone, or face-to-face. The more formal term, sample survey, emphasizes that the purpose of contacting respondents is to obtain a representative sample of the target population.

**Learning Activities**

This unit will require you to complete the following:

* Read the Learning Objectives for this Unit: These learning objectives direct you to the key material in this unit. When reading the assigned chapters, consider the learning objectives and focus your study on developing a strong understanding of these objectives. Further - the questions on the tests will reflect the Learning Objectives.
* Read Chapter 7 - Survey Research.
* Complete the online Self-Quiz.
* Review the unit Flashcards and the unit Glossary.

**Surveys In Marketing Research**

Surveys require asking people (respondents) for information using either written or verbal questioning. Questionnaires or interviews collect data through the mail, on the telephone, or face-to-face. The more formal term, sample survey, emphasizes that the purpose of contacting respondents is to obtain a representative sample of the target population. Thus, a survey is defined as a method of primary data collection based on communication with a representative sample of individuals.

**Survey Objectives**

The type of information being gathered depends on a survey’s objectives. Most survey research is descriptive research, which attempts to identify and explain a particular marketing activity. Marketing surveys typically have multiple objectives; few gather only a single type of factual information. Although surveys are often conducted to quantify certain factual information, certain aspects of surveys may also be qualitative. For example, in new-product development the qualitative objective of a survey is often to test and refine new-product concepts.

**Strengths and Weaknesses of Surveys**

Surveys are quite flexible and, when conducted properly, are extremely valuable to managers. They provide a quick, inexpensive, efficient, and accurate means of assessing information about the population. Surveys can also be poorly conducted and certain errors can occur to render such surveys useless. Below, is a summary of some of the key streanghts and weaknesses of survey research. We will now explore this further in the following units:

**Strengths of the Survey Research Method:**

* Surveys are relatively inexpensive (especially self-administered surveys).
* Surveys are useful in describing the characteristics of a large population. No other method of observation can provide this general capability.
* They can be administered from remote locations using mail, email or telephone.
* Consequently, very large samples are feasible, making the results statistically significant even when analyzing multiple variables.
* Many questions can be asked about a given topic giving considerable flexibility to the analysis.
* There is flexibilty at the creation phase in deciding how the questions will be administered: as face-to-face interviews, by telephone, as group administered written or oral survey, or by electonic means.
* Standardized questions make measurement more precise by enforcing uniform definitions upon the participants.
* Standardization ensures that similar data can be collected from groups then interpreted comparatively (between-group study).

Usually, high reliability is easy to obtain--by presenting all subjects with a standardized stimulus, observer subjectivity is greatly eliminated.

**Weaknesses of the Survey Research Method:**

* A methodology relying on standardization forces the researcher to develop questions general enough to be minimally appropriate for all respondents, possibly missing what is most appropriate to many respondents.
* Surveys are inflexible in that they require the initial study design (the tool and administration of the tool) to remain unchanged throughout the data collection.
* The researcher must ensure that a large number of the selected sample will reply.
* It may be hard for participants to recall information or to tell the truth about a controversial question.
* As opposed to direct observation, survey research (excluding some interview approaches) can seldom deal with "context."

**Potential Errors in Survey Research**

The exhibit below outlines the various forms of survey error which can affect the accuracy of a survey. Survey error can be broken down into two types. Most surveys try to portray a representative cross-section of a particular target population, but even with technically proper probability sampling random sampling errors will occur because of chance variation. Without increasing sample size, these statistical problems are unavoidable. However, random sampling errors can be estimated. (This will be discussed later in the course)

Systematic errors result from some imperfect research design, or from a mistake in the execution of the research. These errors are also called nonsampling errors. A sample bias exists when the results of a sample show a persistent tendency to deviate in one direction from the true value of the population parameter. The two general categories of systematic error are respondent error and administrative error.

**Respondent Error**

If the respondents do not cooperate or do not give truthful answers then two types of error may occur.

**Nonresponse Error**

To utilize the results of a survey the researcher must be sure that those who did respond to the questionnaire were representative of those who did not. If only those who responded are included in the survey then nonresponse error will occur. Nonrespondents are most common in mail surveys, but may also occur in telephone and personal surveys in the form of no contacts (not-at-homes) or refusals. The number of no contacts has been increasing because of the proliferation of answering machines and growing usage of Caller ID to screen telephone calls. Self-selection may also occur in self-administered questionnaires; in this situation, only those who feel strongly about the subject matter will respond, causing an over representation of extreme positions. Comparing the demographics of the sample with the demographics of the target population is one means of inspecting for possible biases. Additional efforts should be made to obtain data from any underrepresented segments of the population. For example, callbacks can be made on the not-at-homes.

**Response Bias**

Response bias occurs when respondents tend to answer in a certain direction. This bias may be caused by an intentional or inadvertent falsification or by a misrepresentation of the respondents’ answers.

**deliberate falsification**: people may misrepresent answers in order to appear intelligent, to avoid embarrassment, to conceal personal information, to “please” the interviewer, etc. It may be that the interviewees preferred to be viewed as average and they will alter their responses accordingly.

**unconscious misrepresentation**: response bias can arise from question format, question ambiguity, or content. Time lapse may lead to best-guess answers.

There are five specific categories of response bias. These categories overlap and are by no means mutually exclusive:

**acquiescence bias**: This is a response bias caused by a respondent’s tendency to concur with a particular position. For example, “yea sayers” who accept all statements they are asked about.

**extremity bias**: Some individuals tend to use extremes when responding to questions, which may cause extremity bias.

**interviewer bias**: If an interviewer’s presence influences respondents to give untrue or modified answers the survey will contain interviewer bias. Respondents may wish to appear wealthy or intelligent, or they may try to give the “right” answer or the socially acceptable answer.

**auspices bias**: The answers to a survey may be deliberately or unintentionally misrepresented because the respondent is influenced by the organization conducting the survey.

**social desirability bias**: This may occur consciously or subconsciously. Answers to questions that seek factual information or matters of public knowledge are usually quite accurate, but the interviewer’s presence may increase a respondent’s tendency toward an inaccurate response to a sensitive question in an attempt by the respondent to gain prestige in the interviewer’s mind.

**Administrative Errors**

The results of improper administration or execution of the research task are examples of administrative errors. Such errors are inadvertently caused by confusion, neglect, omission or some other blunder. There are four types of administrative error:

* data processing error: The accuracy of the data processed by computer depends on correct data entry and programming. Mistakes can be avoided if verification procedures are employed at each processing stage.
* Sample selection error: This type of error is a systematic error that results in an unrepresentative sample because of an error in either the sample design or execution of the sampling procedure.
* interviewer error: Interviewers may record an answer incorrectly, or selective perception may influence them to record data supportive of their own attitudes.
* interviewer cheating: To avoid possible cheating it is wise to inform the interviewers that a small sample of respondents will be called back to confirm that the interview actually took lace.

**Survey Research Methods**

Surveys can be classified in three ways:

1. Method of Communication

Surveys can be classified according to the method of communication— Personal interview, telephone, mail, or internet based surveys.

**Personal Interviews** – this is a form of direct communication between an interviewer and a respondent. With such a direct form of communications, verbal and non-verbal feedback is immediate and clear. Personal interviews involves the interviewee in the process. This involvement in-turn allows for probing and complex questions to be asked in an environment that supports explaination and the use of visual aids.

With so much involvement this makes for a time consuming process where there is little protection of anonymity and there is room for undue interviewer influence in the survey process.

**Telephone interviews** – this is another form of direct communication between an interviewer and a respondent; however it is not in person. Compared to personal interviews, telephone interviews are much less costly however there is no face-to-face contact so visual aids cannot be used.

**Mail Surveys** – Sending mail questionnaires allows for high geographic coverage with minimal cost. The absence of an interviewer to help respondents complete the survey coupled with the perception that mail surveys are “junk mail” means that these type of surveys have limited effectiveness. There are techniques available to increase response rates, these include; adding a cover letter to explain the purpose of the survey; asking well designed, interesting questions; paying a reward or offering a prize for the survey’s competition and return and follow-up all help response rates.

**Internet based surveys** – Internet based surveys are similar to mail surveys with the exception to the distribution system. Literally thousands of surveys can be emailed to potential respondents virtually cost free. Similar to mail questionnaires respondent response rates can be greatly improved by asking well designed, interesting questions; paying a reward or offering a prize for the survey’s competition and return and follow-ups.

**2. Structured and Disguised Questions**

A structured question limits the number of responses available, whereas unstructured questions tend to be open-ended, allowing the respondent considerable freedom in responding. The researcher can also disguise the questions, which is particularly advisable if the subject matter is of a threatening nature. Other questions do not need to be disguised as it is assumed that the respondent is willing to reveal the information.

Questions can be categorized according to their degree of structure and disguise. This helps in the selection of the appropriate communication medium for conducting the survey. However, it is not always easy to categorize the surveys as the categories are not clear cut and most surveys are a hybrid of structured and unstructured questions.

**3. Classifying Surveys on a Temporal (Time Related) Basis**

**cross-sectional study**: This is the most common type of study in which the data is collected at a single point in time. In such a study, various segments of the population are sampled so that relationships among variables may be investigated by cross-tabulation.

**longitudinal study**: In longitudinal studies, respondents are questioned at different points in time so that changes occurring can be observed over time. Longitudinal studies which involve two or more samples at different times are called cohort studies because similar people are expected to be in each sample over time. Such studies can also be called tracking studies because they are designed to compare aggregate trends and identify changes. Having two or three different sample groups avoids response bias which might normally result from prior interview, but the researcher can never be sure that the changes in the variable being measured are not actually due to having different people in the sample. Customer satisfaction research to be used in quality improvement programs is growing in popularity. Customer problems and desires are identified and then survey research is used to track customer satisfaction and the incidence of problems.

**Consumer panel**: This is a longitudinal study which includes gathering data from the same sample over time. The panelists record their purchasing habits in a diary for a set period of time. Panels are generally expensive and, thus, are usually managed by contractors that specialize in maintaining consumer panels. Such panels enable the investigator to keep track of repeat purchase behavior habits affected by changes in price, special promotions, or other aspects of marketing strategies.

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| **Chapter 7** |
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MR2300 Business Research - Unit 5.  Primary Data Research - Surveys -    Glossary of Terms

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| **Glossary of Terms** | |
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| **Chapter 7** | |
| **Acquiescence bias** | A tendency for respondents to agree with all or most questions asked of them in a survey. |
| **Administrative error** | An error caused by the improper administration or execution of the research task. |
| **Callbacks** | Attempts to recontact individuals selected for a sample who were not available initially. |
| **Central location interviewing** | Telephone interviews conducted from a central location using watts lines at fixed charges. |
| **Computer-assisted telephone interviewing (CATI)** | Technology that allows answers to telephone interviews to be entered directly into a computer for processing. |
| **Cover Letter** | Letter that accompanies a questionnaire to induce the reader to complete and return the questionnaire. |
| **Data-processing error** | A category of administrative error that occurs because of incorrect data entry, incorrect computer programming, or other procedural errors during data analysis. |
| **Dialog boxes** | Windows that open on a computer screen to prompt the user to enter information. |
| **Door-to-door interviews** | Personal interviews conducted at respondents’ doorsteps in an effort to increase the participation rate in the survey. |
| **Drop-off method** | A survey method that requires the interviewer to travel to the respondent’s location to drop off questionnaires that will be picked up later. |
| **E-mail surveys** | Surveys distributed through electronic mail. |
| **Extremity bias** | A category of response bias that results because some individuals tend to use extremes when responding to questions. |
| **Fax survey** | A survey that uses fax machines as a way for respondents to receive and return questionnaires. |
| **Internet survey** | A self-administered questionnaire posted on a website. |
| **Interviewer bias** | A response bias that occurs because the presence of the interviewer influences respondents’ answers. |
| **Interviewer cheating** | The practice of filling in fake answers or falsifying questionnaires while working as an interviewer. |
| **Interviewer error** | Mistakes made by interviewers failing to record survey responses correctly. |
| **Item nonresponse** | Failure of a respondent to provide an answer to a survey question. |
| **Mail Survey** | A self-administered questionnaire sent to respondents through the mail. |
| **Mall intercept interviews** | Personal interviews conducted in a shopping mall. |
| **Mixed-mode survey** | Study that employs any combination of survey methods. |
| **No contacts** | People who are not at home or who are otherwise inaccessible on the first and second contact. |
| **Nonrespondents** | People who are not contacted or who refuse to cooperate in the research. |
| **Nonresponse erro**r | The statistical differences between a survey that includes only those who responded and a perfect survey that would also include those who failed to respond. |
| **Personal interview** | Face-to-face communication in which an interviewer asks a respondent to answer questions. |
| **Pretesting** | Screening procedure that involves a trial run with a group of respondents to iron out fundamental problems in the survey design. |
| **Random digit dialing** | Use of telephone exchanges and a table of random numbers to contact respondents with unlisted phone numbers. |
| **Random sampling error** | A statistical fluctuation that occurs because of chance variation in the elements selected for a sample. |
| **Refusals** | People who are unwilling to participate in a research project. |
| **Respondent error** | A category of sample bias resulting from some respondent action or inaction such as nonresponse or response bias. |
| **Respondents** | People who verbally answer an interviewer’s questions or provide answers to written questions. |
| **Response bias** | A bias that occurs when respondents either consciously or unconsciously tend to answer questions with a certain slant that misrepresents the truth. |
| **Response rate** | The number of questionnaires returned or completed divided by the number of eligible people who were asked to participate in the survey. |
| **Sample bias** | A persistent tendency for the results of a sample to deviate in one direction from the true value of the population parameter. |
| **Sample selection error** | An administrative error caused by improper sample design or sampling procedure execution. |
| **Sample survey** | A more formal term for a survey. |
| **Self-administered questionnaires** | Surveys in which the respondent takes the responsibility for reading and answering the questions. |
| **Self-selection bias** | A bias that occurs because people who feel strongly about a subject are more likely to respond to survey questions than people who feel indifferent about it. |
| **Social desirability bias** | Bias in responses caused by respondents’ desire, either conscious or unconscious, to gain prestige or appear in a different social role. |
| **Systematic error** | Error resulting from some imperfect aspect of the research design that causes respondent error or from a mistake in the execution of the research. |
| **Telephone interviews** | Personal interviews conducted by telephone, the mainstay of commercial survey research. |
| **Welcome screen** | The first web page in an Internet survey, which introduces the survey and requests that the respondent enter a password or pin. |